



How to Modify Template Scorecard Page Records to Improve Ease of Use

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Conventions

This document uses a number of typographical conventions to highlight text that refers to a user's interaction with Salesforce and/or FrontRunner:

- **Courier New Bold** font draws the reader's attention to user interface elements, such as buttons, command links and fields. Example: "Click the **save** button."
- `Courier New` font indicates values that need to be entered by the user. Example: "Enter Profiles in the **Quick Find** box."
- *Italicised Courier New* font indicates values that are displayed by Salesforce or FrontRunner. Example: "Check that the user is assigned the *Standard User* profile."

Document Version

This document is compatible with Kraytix FrontRunner Version 1.11.

1 Introduction

Kraytix is developing an enhanced FrontRunner Administrator user interface that will make it easier to create, edit and manage Template Scorecards in your Template Scorecard Library. In the meantime, we have created this “How To” guide that shows you how to configure the Template Scorecard Lightning Experience record pages that ship with FrontRunner to improve ease of use.



Note: For more information about creating and modify Lightning Experience record pages, please refer to the Salesforce documentation at: https://help.salesforce.com/articleView?id=lightning_app_builder_customize_lex_pages.

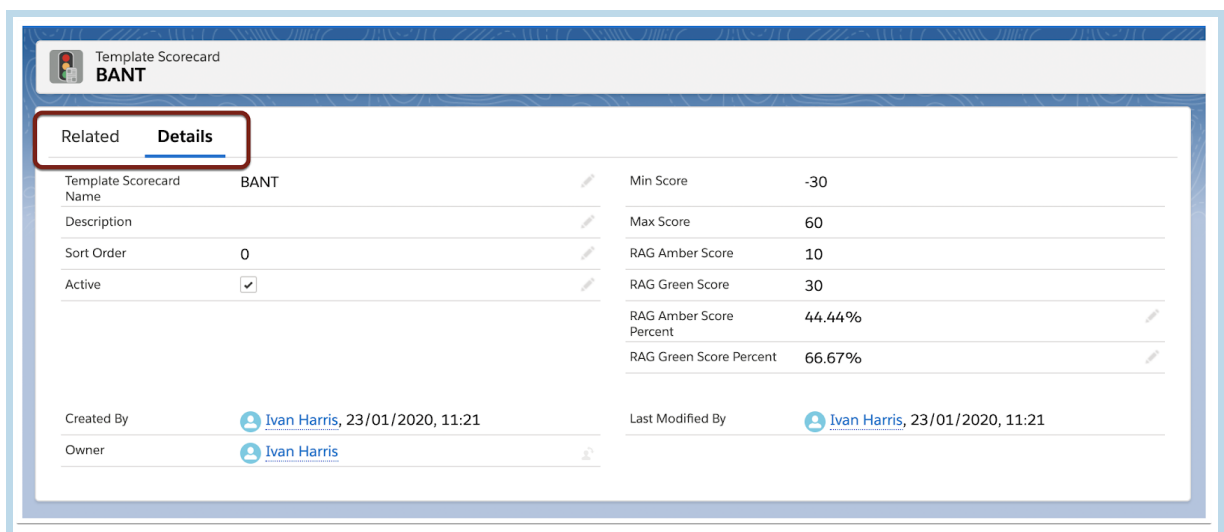
2 Guide Objective

When you create or edit Template Scorecards, you will need to navigate up and down the Template Scorecard, Template Category, Template Criterion and Template Criterion Outcome hierarchy.



Note: For an overview of FrontRunner Scorecards and their hierarchical structure, please read the Kraytix FrontRunner - Scorecard Guide, which can be found on the Kraytix website (<http://www.kraytix.com/>) or on the Kraytix FrontRunner Salesforce® AppExchange® listing (<https://appexchange.salesforce.com/listingDetail?listingId=a0N3A00000DvLDWUA3>).

Navigation is easier if you make a simple modification to the standard Lightning Experience record page's that ship with FrontRunner. Here's the Template Scorecard Lightning Experience record page:

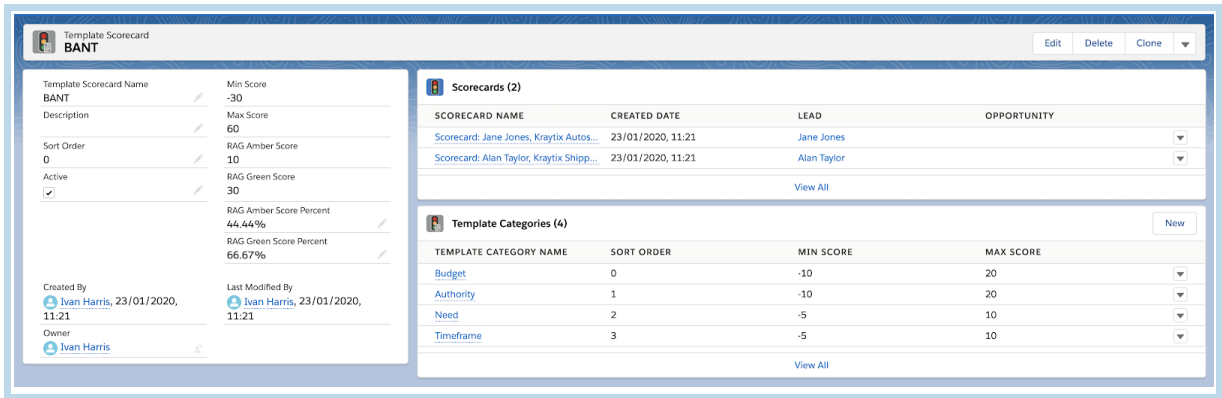


The screenshot shows the 'Details' tab of a Template Scorecard record named 'BANT'. The page is divided into two main sections: a left-hand list of fields and a right-hand table of scores. The 'Details' tab is highlighted with a red box.

Field	Value	Field	Value
Template Scorecard Name	BANT	Min Score	-30
Description		Max Score	60
Sort Order	0	RAG Amber Score	10
Active	☒	RAG Green Score	30
		RAG Amber Score Percent	44.44%
		RAG Green Score Percent	66.67%
Created By	Ivan Harris, 23/01/2020, 11:21	Last Modified By	Ivan Harris, 23/01/2020, 11:21
Owner	Ivan Harris		

To navigate to the Template Categories that are child records of the Template Scorecard, first you must click the **Related** tab before you can view the child records' related list. We believe that this is one click too many when you can view the related list on the record page!

Below is the modified Template Scorecard Lightning Experience record page after completing the instructions in this guide:



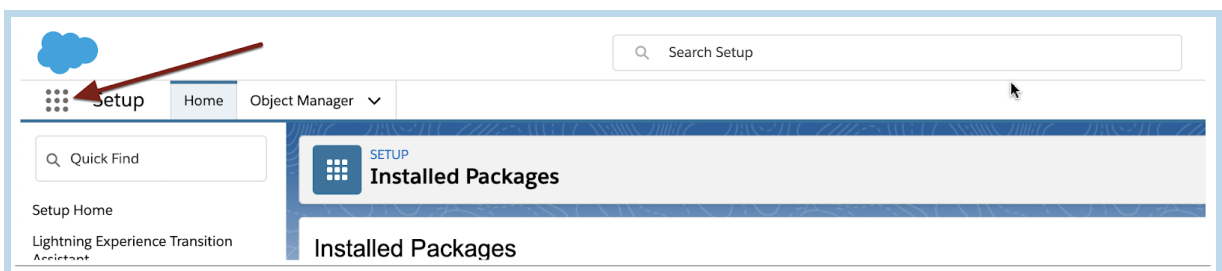
The screenshot displays the 'Template Scorecard' record page for 'BANT'. The left sidebar contains details such as 'Template Scorecard Name', 'Description', 'Sort Order', 'Active' status, 'Created By', and 'Last Modified By'. The main content area is divided into two sections: 'Scorecards (2)' and 'Template Categories (4)'. The 'Scorecards' section lists two records with columns for 'SCORECARD NAME', 'CREATED DATE', 'LEAD', and 'OPPORTUNITY'. The 'Template Categories' section lists four records with columns for 'TEMPLATE CATEGORY NAME', 'SORT ORDER', 'MIN SCORE', and 'MAX SCORE'. A 'View All' link is present at the bottom of each list.

Now all the information you need is readily accessible. On the left are the record details and on the right are the related records, including the Template Categories that are child records of this Template Scorecard. Navigating down the hierarchy is now as simple as clicking the related record and navigating up the hierarchy is a click of the parent record in the record details area.

3 Step by Step Instructions

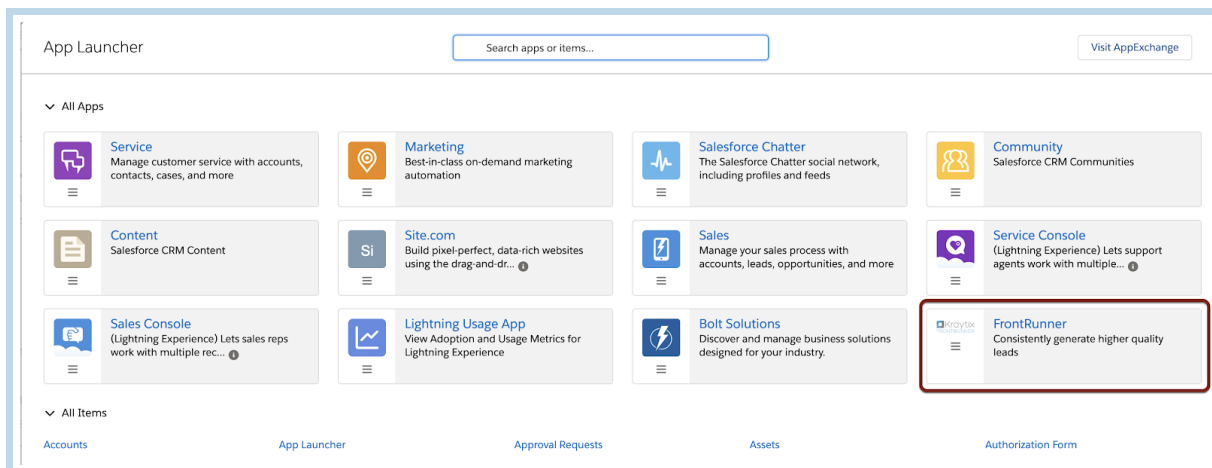
Please perform the following steps to configure the Template Scorecard, Template Category and Template Criterion Lightning Experience record pages.

To navigate to your Template Scorecard Library in Salesforce Lightning Experience, open the App Launcher by clicking the  icon on the left side of the navigation bar.

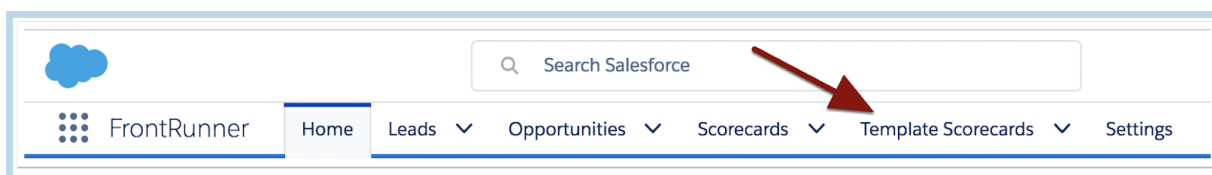


The screenshot shows the Salesforce Lightning Experience Setup page. A red arrow points to the 'Setup' link in the navigation bar, which is located next to the 'Home' and 'Object Manager' links. The 'Setup' link is highlighted with a blue background. Below the navigation bar, the 'Quick Find' search bar is visible, and the 'Installed Packages' section is displayed on the right side of the page.

From the **App Launcher** window, click the **FrontRunner** tile.

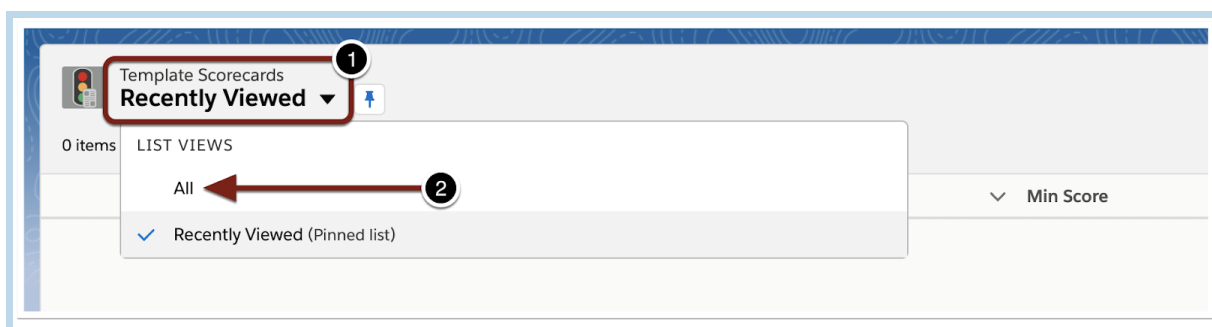


Your Template Scorecard Library is then accessed by clicking the **Template Scorecards** tab.

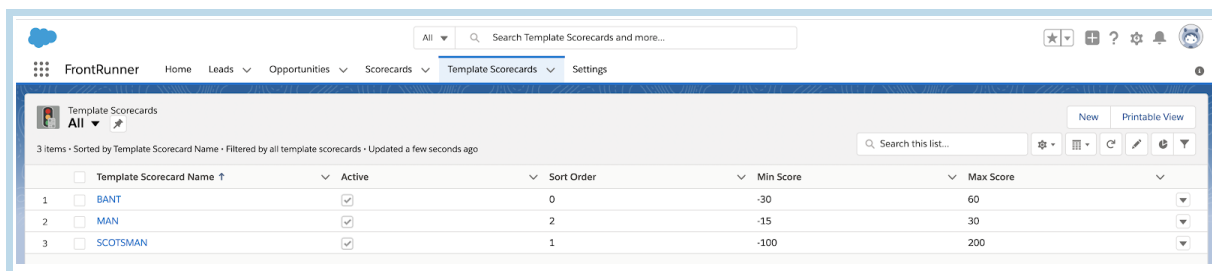


Then perform the following steps:

1. Click the **list views menu** in the Template Scorecards list view
2. Click the **All** menu item



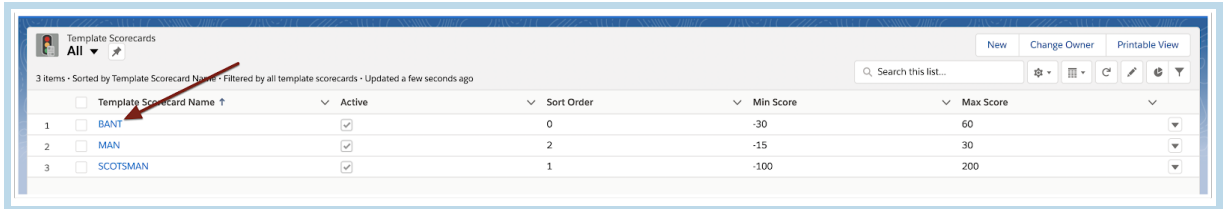
Your Template Scorecard Library should look similar to the following list view:





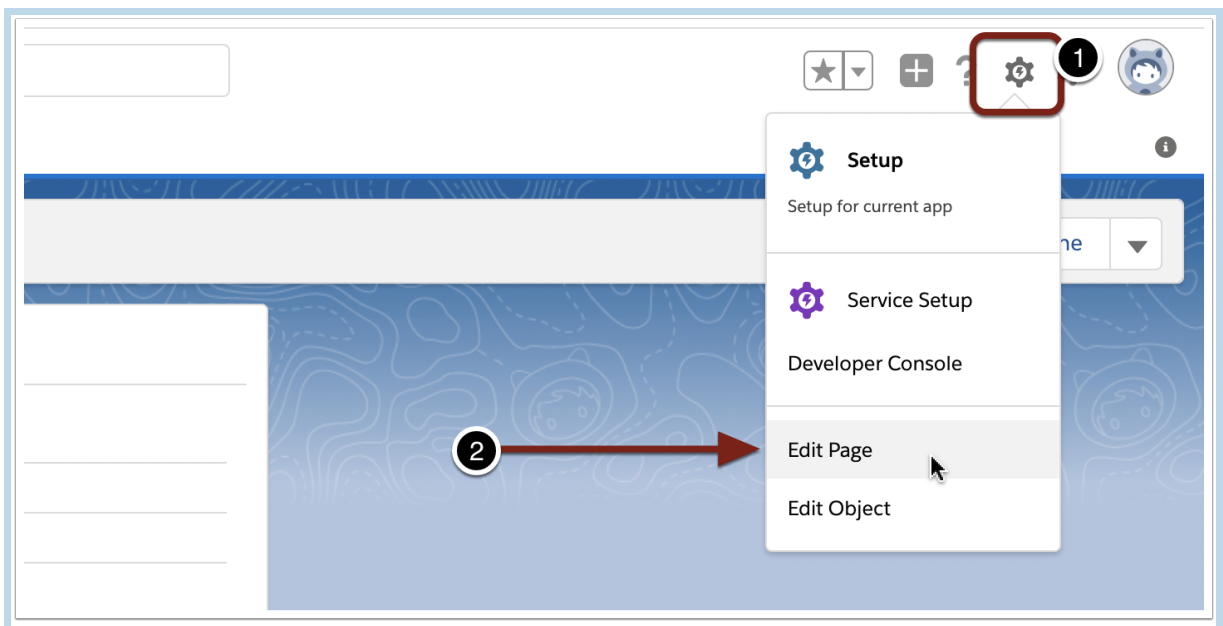
Note: The BANT, MAN and SCOTSMAN Template Scorecards are created as an optional step during the Kraytix FrontRunner app installation. For further information, please refer to the Kraytix FrontRunner - Installation Guide, which can be found on the Kraytix website (<http://www.kraytix.com/>) or on the Kraytix FrontRunner Salesforce® AppExchange® listing (<https://appexchange.salesforce.com/listingDetail?listingId=a0N3A00000DvLDWUA3>).

Click on one of the Template Scorecards. In this guide we will click on the **BANT** Template Scorecard.

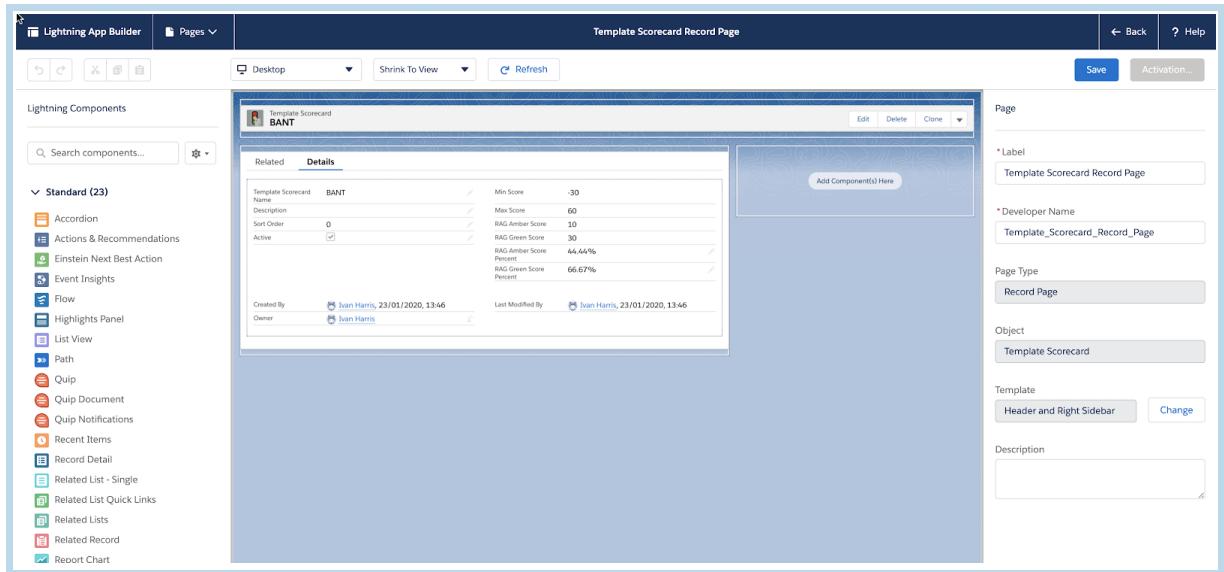


Then perform the following steps:

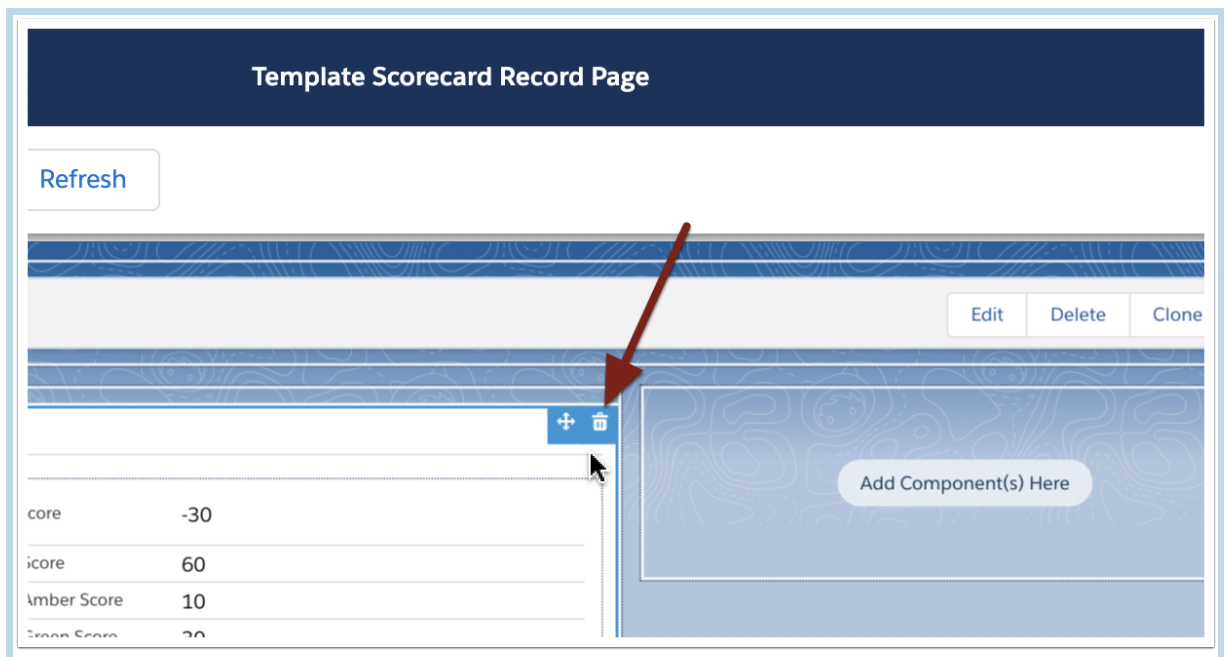
1. Click the **setup** cog icon in the top right hand corner
2. Click the **Edit Page** menu item



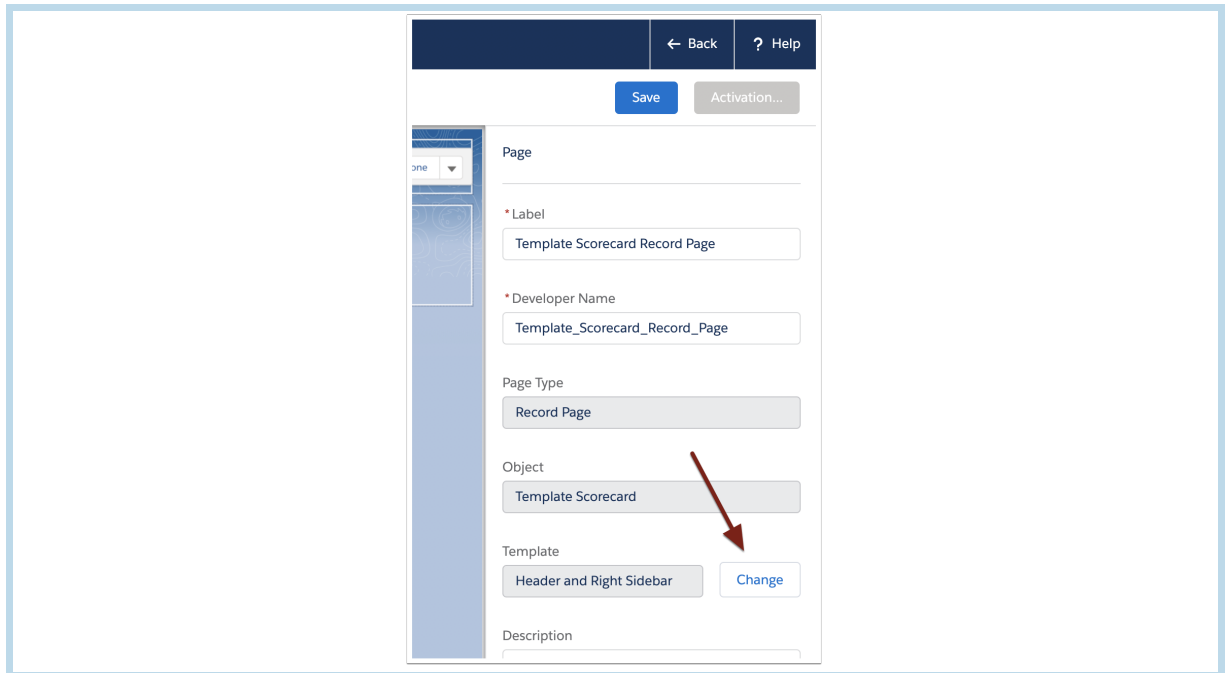
This opens **Lightning App Builder**, which is shown below:



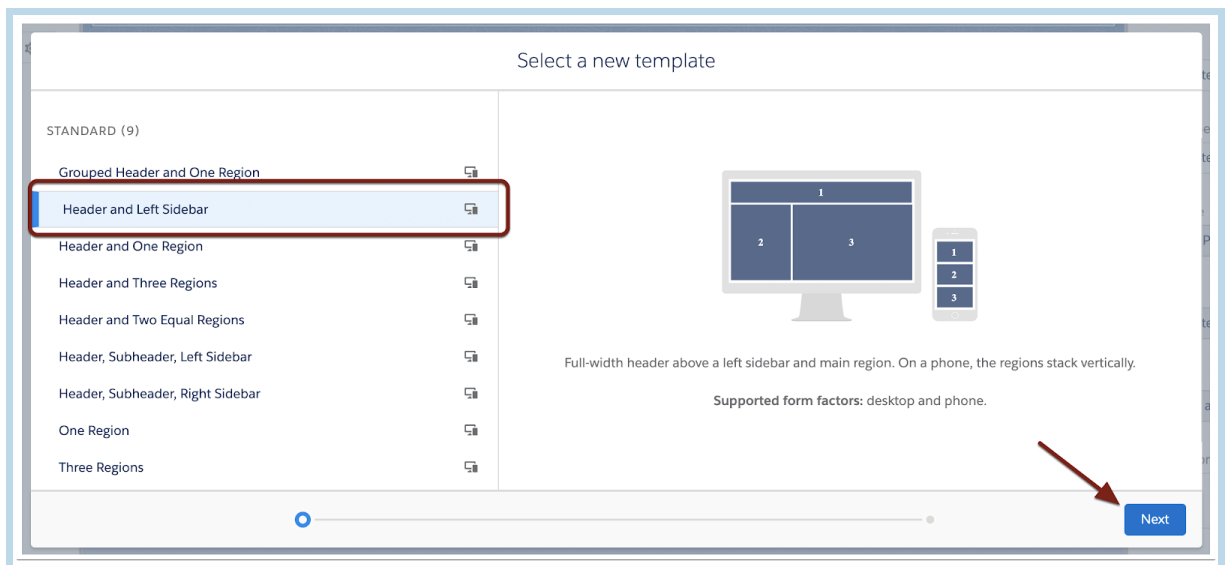
Delete the **Tab** component by clicking the **bin** icon.



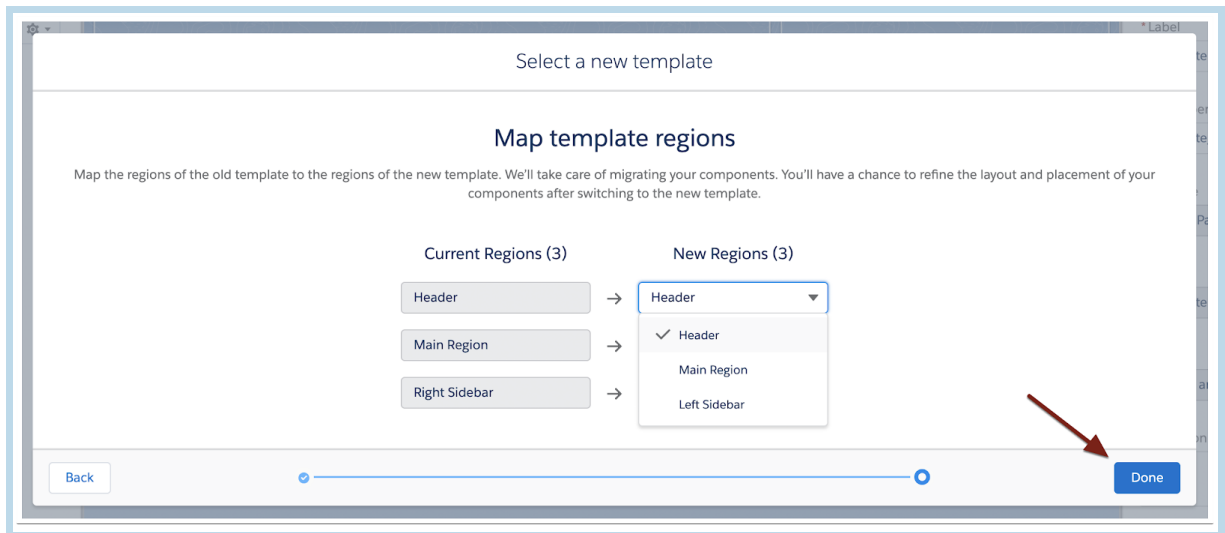
In the right hand pane, in the **Template** section, click the **Change** button.



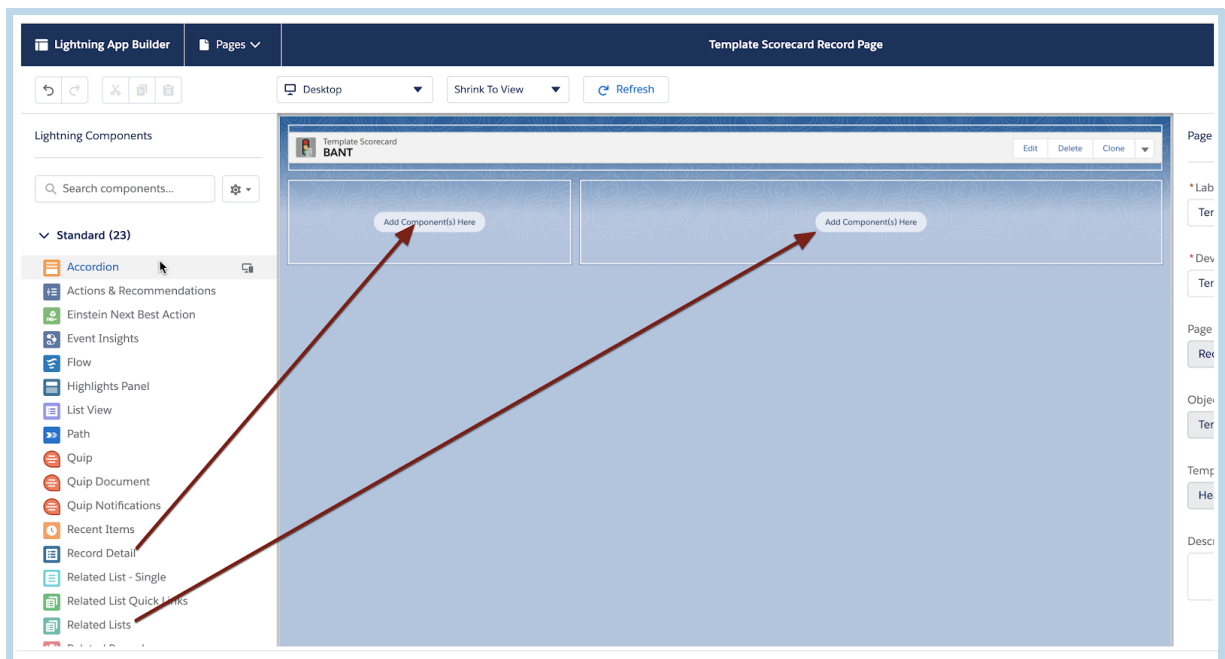
Select the *Header and Left Sidebar* template and click the **Next** button.



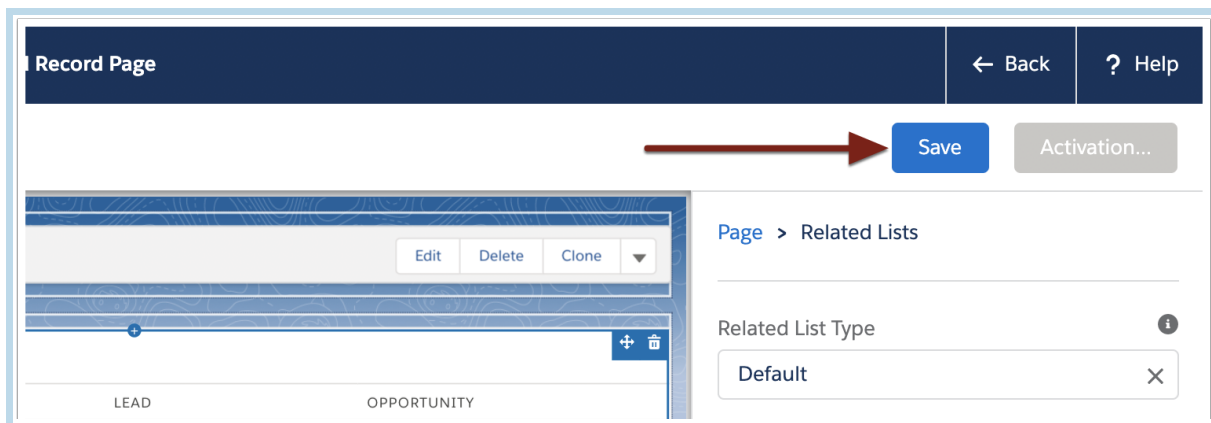
Click the **Done** button.



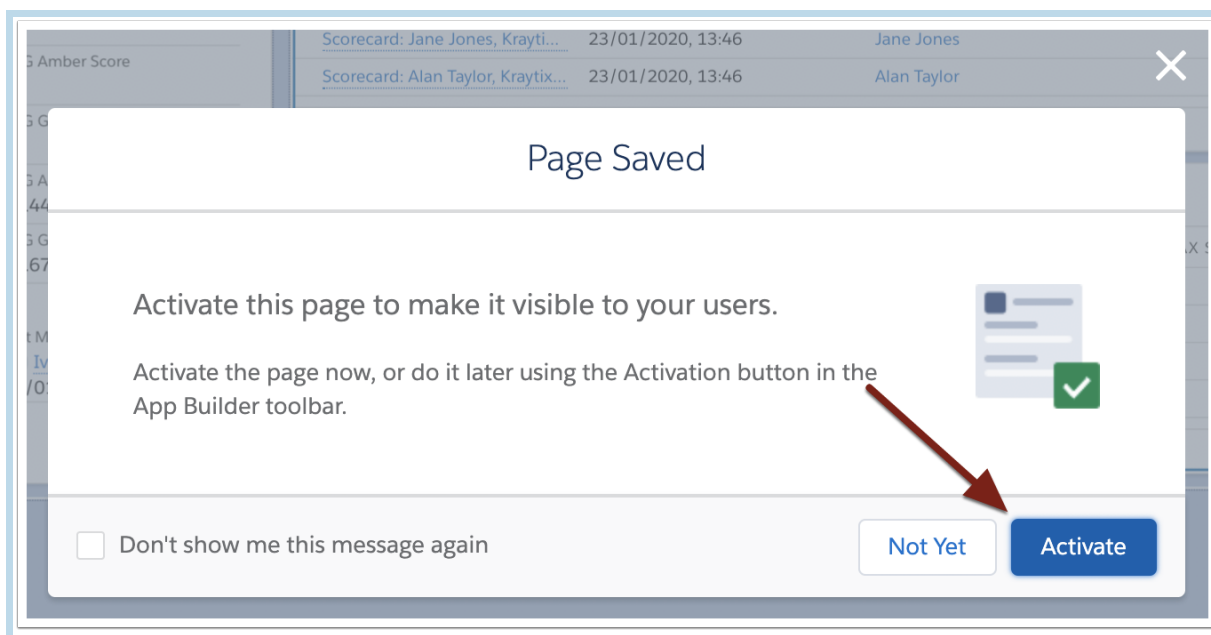
Drag and drop the **Record Detail** Lightning component to the left sidebar and the **Related Lists** Lightning component to the main area.



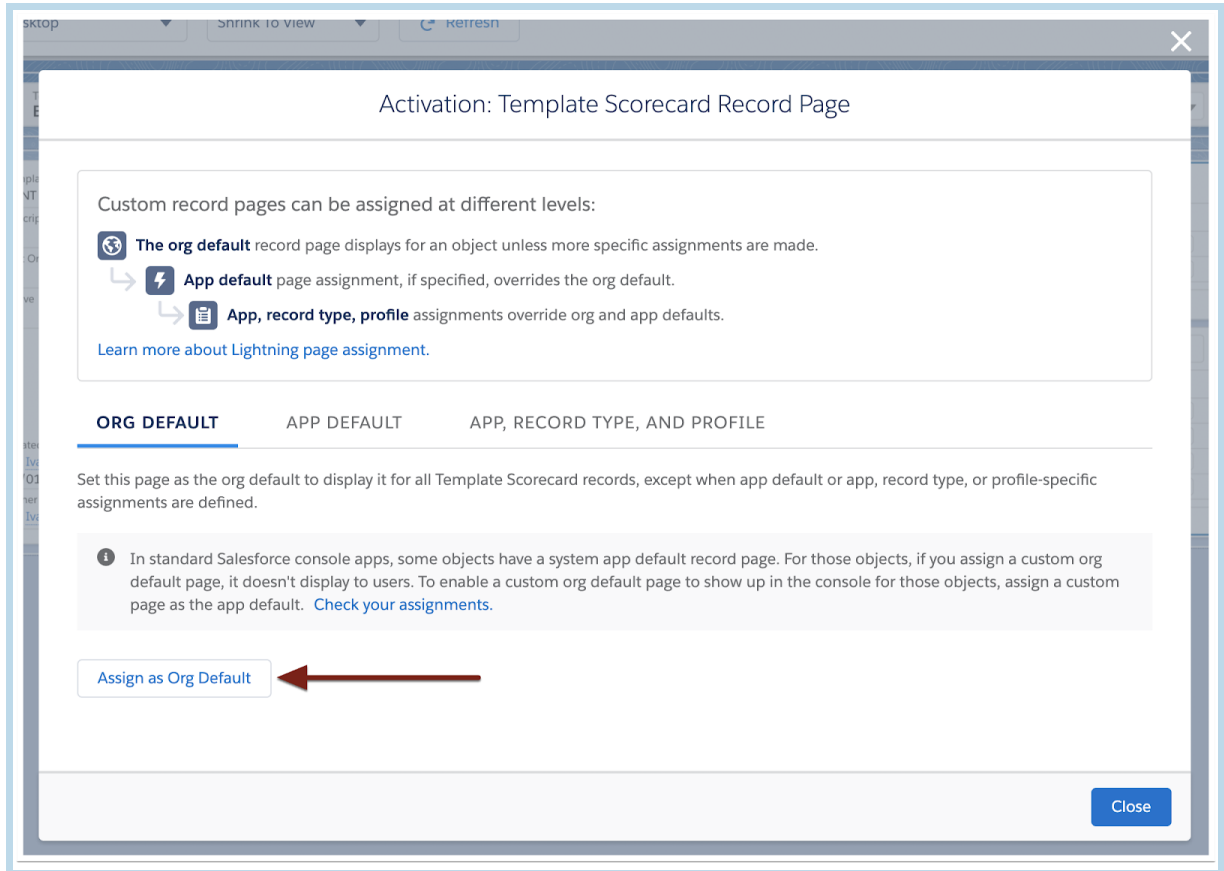
Click the **Save** button.



The **Page Saved** window will appear (unless you have selected **Don't show me this message** again on a previous occasion). Click the **Activate** button.



The **Activation: Template Scorecard Record Page** window will be shown. Here you choose which users will see the new record page when they view a Template Scorecard. Click the **Assign as Org Default** button so that all FrontRunner Administrators will see the new record page.



In the **Assign form factor** window, keep the default selection of **Desktop** and click the **Next** button.

Assign form factor

Select the form factors that you want your org default page to be available for.

☒ Desktop
☐ Phone
☐ Desktop and phone

Cancel Back Next

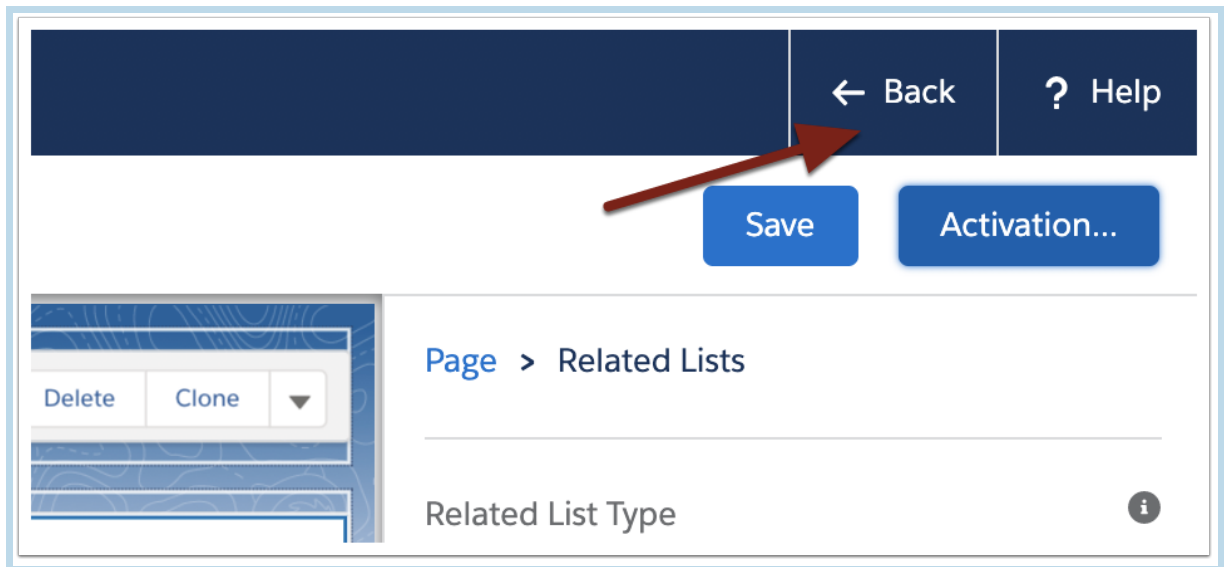
Click the **Save** button in the **Review assignment** window.

Review assignment

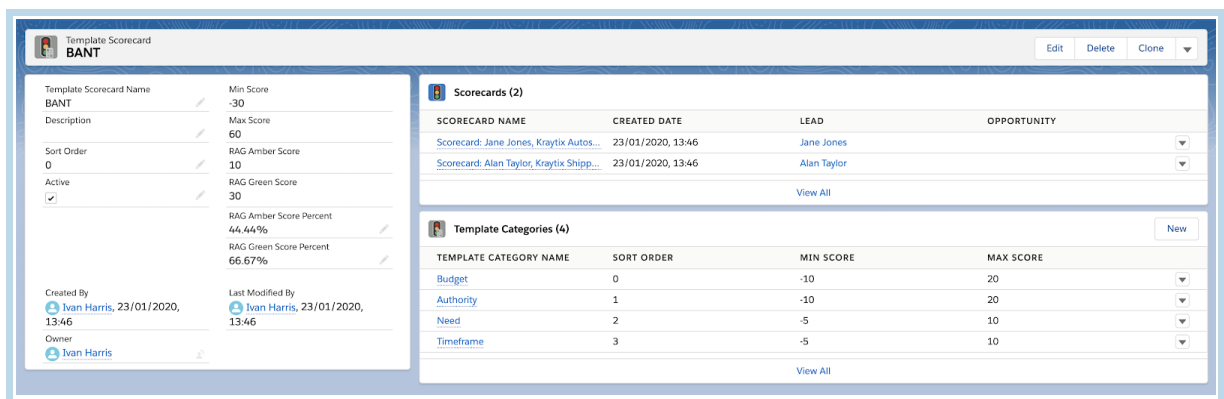
FORM FACTOR	CURRENT ORG DEFAULT	NEW ORG DEFAULT
Desktop	System Default	Template Scorecard Record Page

Cancel Back Save

Finally, click the **Back** link to exit the Lightning App Builder.



The BANT Template Scorecard will be displayed with the new layout as follows:



Please follow the same instructions to modify the Template Category and Template Criterion record pages.

4 Navigating the Hierarchy

With the new Lightning Experience record pages configured, navigating up and down the Template Scorecard hierarchy is easy.

Open the BANT Template Scorecard. To navigate down to a Template Category, click its link in the **Template Categories** related list, in this case **Budget**.

TEMPLATE CATEGORY NAME	SORT ORDER	MIN SCORE	MAX SCORE
Budget	0	-10	20
Authority	1	-10	20
Need	2	-5	10
Timeframe	3	-5	10

You can continue to navigate down to a Template Criterion by clicking its link in the **Template Criteria** related list. To navigate back up to this Template Category's parent Template Scorecard, click the **Template Scorecard** link in the record details, in this case **BANT**.

TEMPLATE CRITERION NAME	SORTORDER	MIN SCORE	MAX SCORE
Does the customer have a budget fo...	0	-5	10
Is the budget sufficient to procure o...	1	-5	10